

The Marketing Five: Teacher Guide

Initiating the Project			
Process	Purpose	Instructions	Deliverable
Introduce Project	To acquaint students with and generate interest in project	If this is the students' first exposure to project management, explain the role of project management in the classroom, in business, and in life. Use the entry event to kick off the project. Then, discuss the driving question with the class. Finally, share the project statement of work and rubric with the students, and discuss the project's scope and deliverables.	N/A
Identify Stakeholders	To determine who will be involved in and/or impacted by the project	Each team should use the template provided to identify individuals who will be involved in and/or impacted by the project and its results.	Stakeholder Register
Develop Project Charter	To define the project and create a formal record of it	Each team should use the template provided to develop a scope overview; identify the purpose and benefits; create a milestone schedule; identify acceptance criteria; determine risks, assumptions, and constraints; and explain the team's operating principles.	Project Charter
Authorize Project	To indicate that each team has your approval to continue	Review the teams' stakeholders registers and project charters to determine whether each team is suitably prepared to proceed. Return the teams' documents, and explain that each team should compile its work in a central location (e.g., binder, Google Drive, etc.).	N/A

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Planning the Project				
Process	Purpose	Instructions	Deliverable	
Introduce Project Planning	To acquaint students with project management plans	Discuss the components of a project management plan with the class. Explain that students must develop each of these components before they can move on to “doing” the project. In essence, students must “plan the work” before they can “work the plan.”	N/A	
Define Scope	To determine the scope of the project and project product	Each team should analyze the overview scope in its project charter and use the template provided to further define the scope of both the project and project product. Students should develop detailed descriptions of the project itself and the product of the project, clearly identifying what will be included vs. what will be excluded from the project and products.	Project Scope Statement	
Create WBS	To break the project/project deliverable into smaller chunks	Each team should develop a work breakdown structure (WBS). The WBS is a detailed hierarchical listing of all of the things that must be delivered and all of the activities that must be carried out to complete the project. The WBS breaks the project deliverable into smaller and smaller chunks of work, called work packages. After developing a WBS, each team should also create a WBS dictionary that describes each component of the WBS in more detail.	WBS & WBS Dictionary	
Sequence Activities	To determine the order of project activities	Each team should put its work packages in a logical order for completing the project. Assist students in determining any work packages that can be done concurrently, rather than consecutively, during the project.	Project Sequence	
Estimate Activity Durations	To estimate time needed to complete project activities	Students should estimate the amount of time required for each work package.	Time Estimates	

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Planning the Project (cont'd)			
Process	Purpose	Instructions	Deliverable
Develop Schedule	To create a schedule for completing project activities	Students should assign any external deadlines to the corresponding milestones. Then, they should assign dates to all of the other work packages based on these deadlines and the estimated time require for each work package. If students have not done so already, instruct them to move their project schedules to a Gantt chart, spreadsheet, or scheduling software.	Project Schedule
Plan Human Resource Management	To establish project roles and responsibilities	Each team should consider team members' strengths and abilities and then use the template provided to identify students' roles and responsibilities chart. Students should also complete the team responsibility matrix (RAM) by listing project work packages and identifying who will be responsible for completing each work package. The team member(s) leading the efforts to complete a certain work package have primary responsibility (P) for the task. Teammates assisting with these efforts have secondary responsibility (S) for the task. Team members who are responsible for approving the work that has been done are marked with an A = Approval.	Human Resource Management Plan
Plan Communications Management	To determine when and how to communicate with stakeholders	Each team should use the template provided to explain what information to communicate, to whom the information should be communicated (e.g., teammates, teacher, etc.), how the information will be communicated, and how frequently the communications should occur.	Communications Management Plan

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Planning the Project (cont'd)			
Process	Purpose	Instructions	Deliverable
Plan Quality Management	To determine quality requirements for project deliverables and processes	Each team should use the template provided to identify each of the project deliverables, the level of quality required for each deliverable (the quality criteria column), methods for managing and validated the deliverables' quality (the quality control/assurance activities column), and the individual(s) responsible for managing the quality of the deliverables. After completing the project deliverables matrix, students should repeat the exercise, but this time focusing on project work processes.	Quality Management Plan
Plan Risk Management	To identify risks, perform risk analyses, and plan risk responses	Students should review the potential risks that they identified in their project charter and then use the template provided to identify those and any other risks associated with successful completion of their project, determine the potential cause(s) of each risk, and estimate the probability that the risks will occur. Students should also determine the potential impact of the risks if they occur and what strategies they will use to mitigate that impact.	Risk Management Plan

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Executing the Project			
Process	Purpose	Instructions	Deliverable
Manage & Do Work	To develop the project deliverable	After completing its project management plan, each team should review its team members' roles, responsibilities, and deadlines as defined in its project management plan. Then, students should begin work on the actual project deliverable—the pathway manual. Although students' specific actions and activities should be dictated by their team project management plan, the following project processes and outcomes have been identified for reference.	Pathway Manual
Post Questions to Quora	To gather career advice	Students should register for a Quora account (http://www.quora.com/). Then, each student should post the question "What career advice would you give to someone who wants to become a (<i>the student's career of choice for the project</i>)?" Students should check their Quora accounts throughout the project to gather feedback from respondents.	Career Advice Provided by Quora Members
Research Selected Career	To collect information about selected career	Each student should conduct further research on one career (within the team's pathway) that s/he is interested in pursuing. This research should result in information about the education (including high-school courses and college major), licensures/certifications, and professional association memberships recommended for the position; work experience that would aid an individual in attaining that career goal; CTSO competitive events related to that career; and advice that marketing professionals would give to someone interested in the career.	Secondary Research Results
Develop Career Spotlight	To share information about selected career	Each student should develop his/her career "spotlight" section of the team's pathway manual.	Career Spotlight

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Executing the Project (cont'd)			
Process	Purpose	Instructions	Deliverable
Develop Pathway Overview	To share information about a pathway	Members of each team should work collaboratively to create an overview of its pathway (to be sequenced prior to the career spotlights within the pathway manual).	Pathway Overview

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Monitoring & Controlling the Project				
Process	Purpose	Instructions	Deliverable	
Report Performance	To notify the project sponsor (the instructor) of project progress	Each team should use the template provided to complete and submit a project status report to the project sponsor (instructor). (Determine the frequency of the status reports based on the nature and length of the project.)	Project Status Reports	
Record Issues	To define issues and develop necessary responses	When issues arise while executing the project, each team should use the template provided to make note of these issues. Team members should come together to discuss each issue, estimate its potential impact, and determine steps to take (if any) to respond to the issue.	Project Issue Log	
Perform Integrated Change Control	To gain the project sponsor's (instructor's) approval for changes to processes and/or deliverables	If a team determines that a significant change needs to be made to its project due to any identified issue, members of the team should use the template provided to notify the project sponsor (instructor) of the necessary change. Students should submit the change request form for approval.	Change Request Form(s)	
Control Scope, Schedule, Quality, & Risks	To conduct variance analyses and develop any necessary responses	Students should verify that they are on schedule (and what actions to take if they are ahead of or behind schedule), validate and control the scope of the project (so that they do not get sidetracked or distracted by things not within the scope of the project), perform quality control and quality assurance activities, and monitor and control project risks.	N/A	

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Closing the Project			
Process	Purpose	Instructions	Deliverable
Present Pathway Manual	To share pathway manual with business professionals	Arrange for a business professional from each pathway to review the corresponding pathway manual and provide feedback to students either in-person or via technology.	Pathway Manual
Submit Deliverables	To submit work for review	Students should submit their project deliverable for evaluation.	Final Project Deliverable
Conduct Post-Project Review	To collect feedback from project stakeholders	Each team should use the template provided to gather feedback from all project stakeholders, including the project team and sponsors.	Post-Project Reviews
Document Lessons Learned	To reflect on the project and students' learning	Each team should compile and analyze the data that it collected via the post-project review forms. Then, each team should use the template provided to document its lessons learned. Finally, each student should use the template provided to assess her/his and his/her teammates' overall performance on the project.	Lessons Learned & Self & Peer Assessment